Onboarding New Staff

Key Elements

With the constant rate of staff turnover, it is important that ECS System Supervisors are aware of all steps involved in onboarding. These steps are outlined below and described in further detail throughout this handout. There are additional reference handouts attached to this webinar as well that can be used to provide new staff members who are new to ECS.

Checklist

- Gather user information
- Create new user in ECS
- Create new provider in ECS (if applicable)
- Create new *Client Sign On* user
- Provide training
- Provide training materials/guidance

Supplemental Handouts

1. User Setup
2. Fake Residents for Practice
3. Core Training
4. Surveyors (NH)
5. Client Sign On Guide

Gather User Information

Before setting up a new user, you will want to determine a few things. First, you will need to know if they are a temporary employee, such as a nurse aide/nurse student, who will not be at the facility long-term. If so, they may be setup as a temporary user, rather than a regular user. The only difference between temporary and regular is that temporary users allow for you to enter in an end date which no longer allows access to the system with that username after that date. This works well if you know for sure that the temporary user will not be in the building past the date, however, should not be utilized if you are ever unsure. The end date of a temporary user can be continually extended if needed.

Another user that differs from others is a surveyor. Although their setup is very similar, they will have a different handout made available to them. In addition, you will want to have someone check the entire survey user group access to ensure that all buttons work correctly and load as they are intended. Even the slightest change in a surveyor user group can cause unattended disruptions in their access. It is important to test out the survey user group frequently.

Once you have determined if they are a surveyor or a temporary user, then you will want to gather the necessary information to get them setup as a user:

1. First Name
2. Last Name
3. Middle Name or initial (this field is not required and may be left blank if needed)
4. Job Title
5. Preferred Login Name (most facilities have a standard they follow for login names)
6. User Group the user should be placed into (the options available will vary per facility, each user should be placed into a group that most closely aligns with the access they need)
7. Whether they would like an enlarged font size or not (ECS defaults to size 8 fonts, which tends to be small for some users, a user may not know if they want enlarged font until after they begin using ECS which is OK as this can be adjusted at a later time if needed)
8. Which clients they should have access to (if your facility is a stand-alone nursing home, there is no need to determine this, however if your facility is a community of care campus with several levels of care, you will want to know which site(s)/service(s) this user should have access too).

Once all information has been gathered, the next steps can be followed.

Create New User in ECS

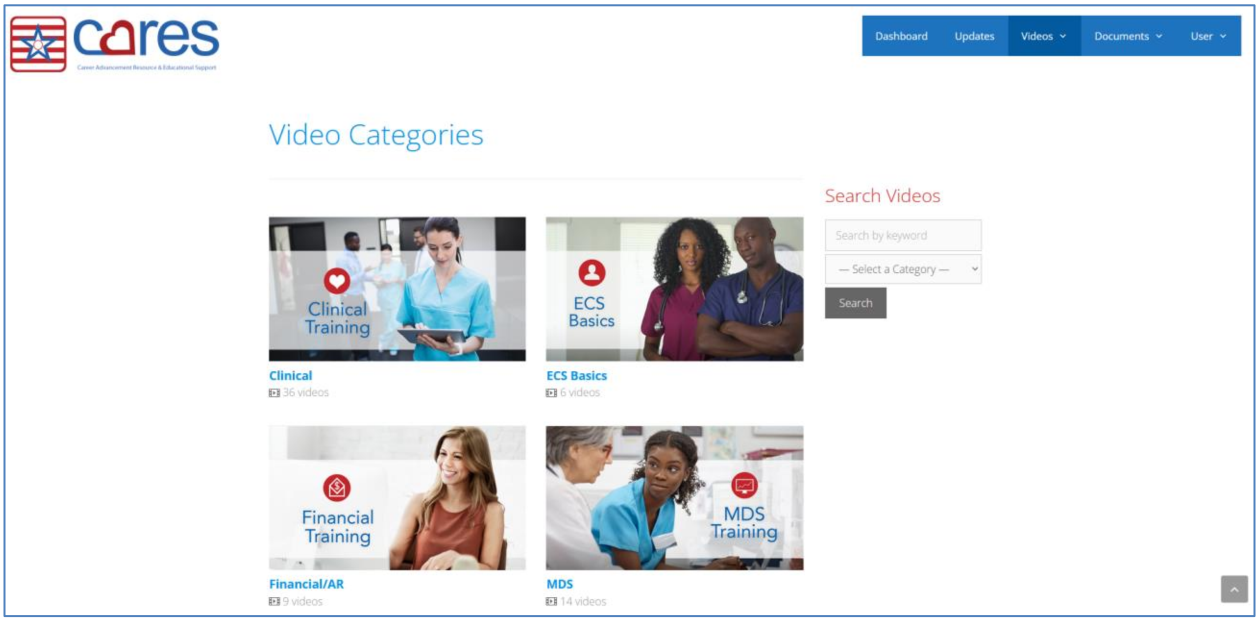
Reference the *User Setup* handout for further details regarding this topic.

Create New Provider in ECS (if applicable)

Reference the *User Setup* and/or the *How to Enter in a Provider* handout for further details regarding this topic.

Create New Client Sign On User

The Client Sign On is a location where ECS provides all our client training materials. These are included as part of your facility's maintenance fees and can be accessed by anyone at the facility who is provided with a login. The logins for the Client Sign On are managed solely by your facility. There is one person at each facility who acts as the facility "Administrator" of your accounts and who can freely add new users and inactive users no longer there. Not all staff will need access to the Client Sign On, however it is a great resource with training videos, webinars, and documentation that can assist the user in learning more about ECS and how to navigate it. If you are unsure who the Client Sign On Administrator for your facility is, feel free to contact us at American Data and we can provide you with that information.



Reference the *Client Sign On Guide* handout to learn how to setup a new user on this site.

Provide Training

Basic training for ECS use may be provided during orientation, or directly on the job. However, it is important that some form of training occurs. Utilize the *Core Training* handout to better assist in which training may be useful to a new user.

Using Fake Residents for Practice

With ECS, there is no test vs. production environment, but rather all users are in the production database every day. To complete training of new staff or to allow new staff members to practice within the production environment, we have fake residents built in that may be utilized. Any documentation, running of reports, starting of MDS assessments, etc. can be completed on these fake residents without harming the live environment.

It is important however that users are made aware of this option and are comfortable with filtering their name list to find these fake residents. Most of our facilities have the fake residents stored in the "Other" filter, however there are some that have them stored somewhere else or keep them in the "Active" filter. Check to be sure where your facility has fake residents stored before utilizing the attached handout for new staff.

Utilize the attached handout titled *Fake Residents for Practice*.

Provide Training Materials/Guidance

It is recommended that all users be provided with handouts which relate to their department. Keep in mind that as ECS is customizable, that the handouts provided on our Client Sign On may not match exactly to how your system is setup. However, some facilities have created their own custom handouts or have tweaked ours to match their workflows more closely.

Below is a list of recommended videos/documentation to be reviewed on the Client Sign On for different types of positions within your facility. If your facility has created more customized materials, those should be utilized prior to anything on the ECS Client Sign On site.

MDS Coordinator

Videos

1. MDS Category > MDS 101, MDS Manager – About & Using, Writing CAA's, MDS Reports, IPA Forecast, ICD-10 Coding, IPA Predictor, Troubleshooting the MDS in a PDPM World, MDS Foundations, Survey Reports (672/802)
2. ECS Basics Category > Documenting in ECS, Log In/Exit/Hide, Editing Features, Using the View Screen

Documentation

1. Clinical > MDS Category > ICD-10 Coding, IPA Forecast, IPA Tools, MDS Coordinator, MDS Foundations, MDS Manager – About & Using, MDS Reports, Writing CAA's
2. ECS Basics > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
3. Clinical > Care/Service Plans > Care Plans

Dietary/Nutrition Department

Videos

1. ECS Basics Category > Documenting in ECS, Log In/Exit/Hide, Editing Features, Using the View Screen
2. Clinical > Departments Category > Dietary Department
3. MDS Category > Writing CAA's

Documentation

1. Clinical > Departments Category > Dietary Notes
2. ECS Basics > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
3. Clinical > MDS Category > MDS (for Departments), Writing CAA's

4. Clinical > Care/Service Plans > Care Plans

Activity Department Director

Videos

1. ECS Basics Category > Documenting in ECS, Log In/Exit/Hide, Editing Features, Using the View Screen
2. Clinical > Departments Category > Activity Department
3. MDS Category > Writing CAA's

Documentation

1. Clinical > Departments Category > Activities Notes
2. ECS Basics > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
3. Clinical > MDS Category > MDS (for Departments), Writing CAA's
4. Clinical > Care/Service Plans > Care Plans

Activity Assistant

Videos

1. ECS Basics Category > Log In/Exit/Hide
2. Clinical > Departments Category > Activity Assistant

Documentation

1. Clinical > Departments Category > Activity Assistant
2. ECS Basics Category > Log In/Exit/Hide

Administrator

Videos

1. ECS Basics Category > Log In/Exit/Hide, Using the View Screen
2. Clinical > Other Category > Survey Entrance Checklist
3. MDS Category > Survey Reports (672/802)

Documentation

1. Clinical > Departments Category > Administrator
2. Clinical > Surveyor Category > Survey Entrance Checklist
3. ECS Basics > Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications

Social Services Department

Videos

1. ECS Basics Category > Documenting in ECS, Log In/Exit/Hide, Editing Features, Using the View Screen
2. Clinical > Departments Category > Social Service Department
3. MDS Category > Writing CAA's

Documentation

1. Clinical > Departments Category > Social Service Department
2. ECS Basics > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
3. Clinical > MDS Category > MDS (for Departments), Writing CAA's
4. Clinical > Care/Service Plans > Care Plans

Nurse

Videos

1. ECS Basics Category > Log In/Exit/Hide, Chat Feature, Documenting in ECS, Editing, Using the View Screen
2. Clinical > Nursing Category > Chart an Admission Assessment, Using the Nursing To Do List (if your facility uses this feature), Chart a Medicare Note, Chart a Fall or Incident Note, COVID-19 Vaccination Charting, Using the MAR
3. Clinical > Physician Orders Category > Entering SS Insulin, Entering Allergies, Editing Medication Orders, Entering IV Medications, Entering Routine and PRN Meds, Entering Non-Formulary Meds
4. Clinical > CNA > CNA Access for Nurses

Documentation

1. ECS Basics Category > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
2. Clinical > Nursing Category > Chart a Fall or Incident Note, Chart a Medicare Note, Chart an Admission Assessment, Electronic Sign, Nurses Notes, Using the Nursing To Do List
3. Clinical > Physician Orders Category > Editing Medication Orders, Entering Allergies, Entering IV Medications, Entering Non-Formulary Medications, Entering Routine and PRN Meds, Physician Orders (Non-Script)
4. Clinical > Care/Service Plans > Care Plans

DON/Nurse Supervisors

Videos

1. ECS Basics Category > Log In/Exit/Hide, Chat Feature, Documenting in ECS, Editing, Using the View Screen
2. Clinical > Nursing Category > Chart an Admission Assessment, Using the Nursing To Do List (if your facility uses this feature), Chart a Medicare Note, Chart a Fall or Incident Note, COVID-19 Vaccination Charting, Using the MAR, Specific Medications List
3. Clinical > Physician Orders Category > Entering SS Insulin, Entering Allergies, Editing Medication Orders, Entering IV Medications, Entering Routine and PRN Meds, Entering Non-Formulary Meds
4. Clinical > Other Category > Diagnosis Entry/Editing/Reports, Survey Entrance Checklist

5. Clinical > CNA Category > CNA Access for Nurses
6. MDS Category > Survey Reports (672/802), Writing CAA's

Documentation

5. Clinical > MDS Category > MDS (for Departments), Writing CAA's
6. ECS Basics > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Chat Feature, Notifications
7. Clinical > Nursing Category > Chart a Fall or Incident Note, Chart a Medicare Note, Chart an Admission Assessment, DON_ADON_Nurse Supervisor, Electronic Sign, Nurses Notes, Using the Nursing To Do List
8. Clinical > Physician Orders Category > Editing Medication Orders, Entering Allergies, Entering IV Medications, Entering Non-Formulary Medications, Entering Routine and PRN Meds, Physician Orders (Non-Script)
9. Clinical > CNA Category > CNA Charting (for Nurses)
10. Clinical > Care/Service Plans > Care Plans

CNA

Videos

1. ECS Basics Category > Log In/Exit/Hide
2. Clinical > CNA Category > CNA Access Charting

Documentation

1. ECS Basics Category > Log In/Exit/Hide
2. Clinical > CNA Category > CNA Access Charting

Housekeeping

Videos

1. ECS Basics Category > Log In/Exit/Hide
2. Clinical > Other Category > Housekeeping

Documentation

1. ECS Basics Category > Log In/Exit/Hide
2. Clinical > Departments Category > Maintenance

Maintenance

Videos

3. ECS Basics Category > Log In/Exit/Hide
4. Clinical > Other Category > Maintenance

Documentation

1. ECS Basics Category > Log In/Exit/Hide
2. Clinical > Departments Category > Maintenance

Pharmacist

Videos

1. ECS Basics Category > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen
2. Clinical > Other Category > Pharmacy Consultant

Documentation

1. ECS Basics Category > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen
2. Clinical > Departments Category > Pharmacy Notes

Infection Preventionist Nurse

Videos

1. ECS Basics Category > Log In/Exit/Hide, Documenting in ECS
2. Clinical > Nursing Category > Specific Medications List
3. Clinical > Infection Preventionist Category > Infection Control in ECS, Employee Health (if used at facility), COVID-19

Documentation

1. ECS Basics Category > Log In/Exit/Hide, Documenting in ECS
2. Clinical > Other Category > Infection Control
3. Clinical > COVID-19 Category > How to Chart SARS-CoV-2 Vaccinations

Admissions

Videos

1. ECS Basics Category > Log In/Exit/Hide, Enter A New Client
2. Clinical > Face Sheet/Diagnosis Category > Demographics & Face Sheets, Diagnoses, Marketing (if used at the facility)

Documentation

1. ECS Basics Category > Log In/Exit/Hide, Enter A New Client
2. Clinical > Face Sheet/Diagnosis Category > Demographics & Face Sheets, Diagnoses, Marketing (if used at the facility)

Therapist/Therapy Assistant

Videos

1. ECS Basics Category > Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen, Enter a New Client
2. Clinical > Departments Category > Therapy Administered

Documentation

1. ECS Basics Category > Chat Feature, Documenting in ECS, Editing, Log In/Exit/Hide, Using the View Screen

2. Clinical > Departments Category > Therapy Treatment & Notes, Therapy Administered
3. Clinical > Care/Service Plans > Care Plans

User Setup

Enter a New User

From the ECS System Supervisor Access menu, click onto the **Create New User** button or navigate via **American Data – ECS** > **Setup** > **Security** > **User**. This screen will load all active users within your facility's database in alphabetical order. Feel free to sort by any other column, by clicking onto the column heading. Keep in mind that if you only have rights to a specific facility within a multi-facility database, you will only see users who are in that site.

1. Click onto the **New** button to create a new user.
2. A **User Properties** screen will open. See below for a description of each tab.
3. Once all necessary tabs are addressed, click **OK** to create the new user.

Identification tab

- Fill in the user's first name, middle name or initial (if known), last name, initials (can be 3-4 characters long), job title, and login name. User initials do not need to be unique.
- Select the Group that the new user should be located in.
- The dot in status will default to Active which is where it should remain if you are creating a new user. For instructions on a Temp User Status, refer to *Enter a New Temporary User*.

Password tab

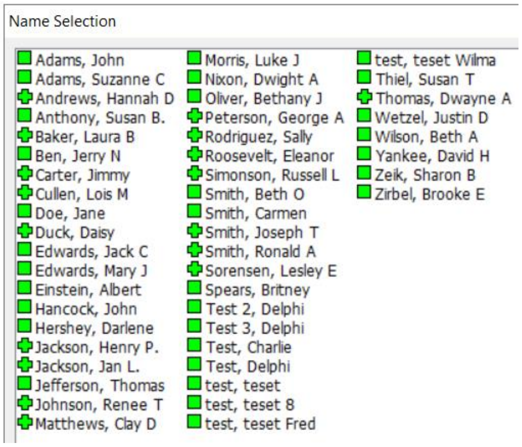
- Enter in a temporary password into **New Password** and **Confirm New Password** boxes. Unless the user is standing next to you and can type in their own password, a temporary password may be entered at this time. The following symbols may not be used in passwords: ; % +
- Place a checkmark in **User must change password at next Login** if you have setup a temporary password for this user to get logged in with initially.
- **Register Finger Print** and **Magnetic Card Reader** should be utilized in states where that form of verification is required.
- Place a checkmark in **Password Expires** if this user should need to reset their password every so many days (the number of days this occurs is setup in System Settings).

Options tab

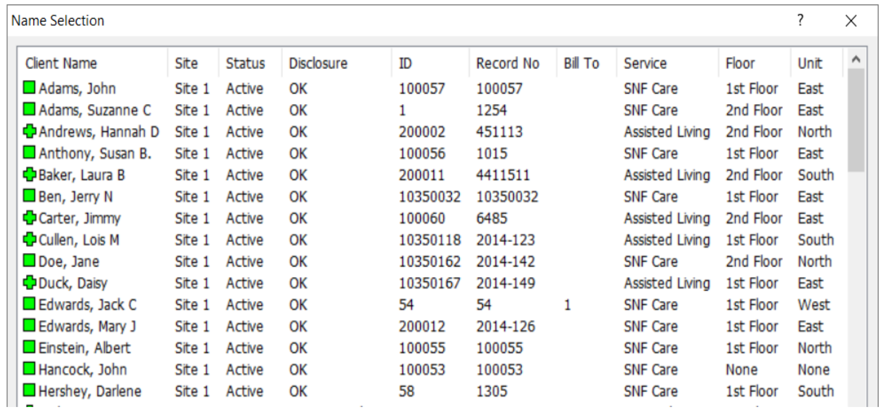
- If a user has requested enlarged font throughout the system, this can be adjusted here. Place a checkmark in **Enlarge Menus** to increase the font size of button words and pop-up menus, such as the name selection screen. Then enter in a number for the default font size (we do not recommend going above 12-14; the default is 8).
- Click onto the **F** button if the user would also like font size increased on the electronic MAR/TAR and in view screens. Adjust font size/style appropriately and click OK to save changes.

- **Show Detailed Name List** may be checked for those users who would like all basic resident demographic data on the Name Selection screen rather than only the resident's name. Typically, this is left un-checked.

Default Name List



Show Detailed Name List checked

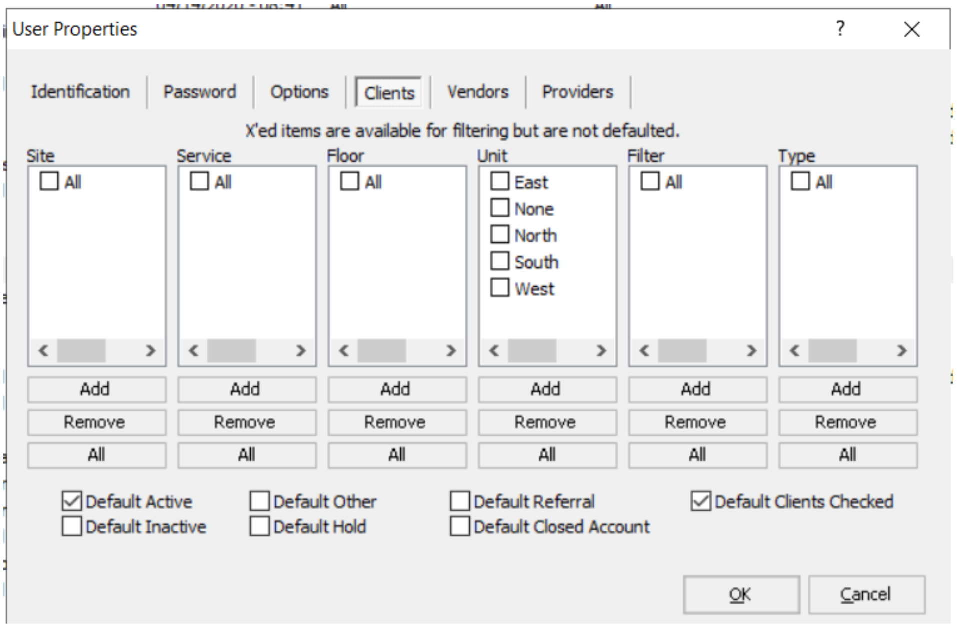


- Show **ECS Confirm Close** message may be checked if you would like the user to be presented with the following message when they exit out of ECS: "You are about to close all tabs and exit ECS." This may be useful for new users if they have multiple tabs open and accidently click the "X" which closes out of ECS completely rather than clicking the "X" on the one tab they meant to close.
- **CoSign Use** will only be utilized on physician/nurse practitioner users who only want to see orders within the Electronic Co-Sign tasks that have their name attached to them. American Data's clinical support staff can assist in determining whether you need to utilize this for your physician/NP users or not.

Clients tab

- The checkboxes at the bottom (Default Active, Default Inactive, etc.) are for setting which default clients the user will be presented with upon logging into ECS. A good standard to follow is that if it is a clinical user, only keep **Default Active** and **Default Clients Checked** (the default settings) in place. If it is a financial user, add a checkmark to **Default Inactive** and **Default Hold**. If it is a test user that should only ever have access to fake clients, only keep **Default Other** and **Default Clients Checked** in place.
- The only time that the checkmark in **Default Clients Checked** should be removed is if this user does not ever need access to client records. For example, if they are a Human Resource user, they will not need access to client records, but instead employee records (which is managed in the **Providers** tab).

- **Site, Service, Floor, Unit/Wing, Other**, etc. may all be restricted for users if needed. If a user only works in one service of a facility or only in one facility in a multi-facility database, then the clients they have access to can be restricted here. Restricting of specific floors and units may not be necessary however in case staff member float throughout the building. Click **Add** under any options that need to be restricted down. If an option should be available to the user, but should not display in their default list upon login (rather they would have to click Filter and then click onto the appropriate hidden option), an "**X**" can be placed into those options. For example, if a staff member works in the nursing home service 90% of the time, but also serves as an on call nurse for the assisted living, then you can click Add under Service and list both nursing home and assisted living. To the left of assisted living, click into the blank box to add a red "X." This means that by default the user will only ever see the nursing home clients unless they specifically filter for assisted living clients.



Vendors tab

This tab will only need to be adjusted if your facility is utilizing our Accounts Payable module and you are creating a new financial user who manages the AP module in ECS. Follow the instructions as seen above for *Clients tab* regarding checkmarks and restricting Site, Service, and other filter options.

Providers tab

This tab will only need to be adjusted if your facility is utilizing our Human Resources module and you are creating a new Human Resource user who manages the employees (providers) in ECS. Follow the instructions as seen above for *Clients tab* regarding checkmarks and restricting Site, Service, and other filter options.

Create a Provider

1. Once you click **OK** to creating a new user, you will be presented with a question, "*Do you want to add a provider for this user?*"
2. Click **Yes** if you anticipate that your facility may ever want to utilize ECS for Human Resource (tracking of employee evaluations, CEU's, employee health data, etc.)

3. The **Provider/Employee Properties** box appears. Some data will auto-populate. Enter in any additional information that is known or click **OK** to save the provider and advance to the **Locate** screen.
4. In the **Locate** screen, place a dot in **Active**, and select the **Site/Service** that this employee will primarily be working within. Select any other filters which are required (any in green text must be selected). Click **OK** once everything has been selected.

Enter a New Temporary User

Navigate via **American Data – ECS** > **Setup** > **Security** > **Temporary User**. This screen will load all temporary users within your facility's database in alphabetical order. Feel free to sort by any other column, by clicking onto the column heading. Keep in mind that if you only have rights to a specific facility within a multi-facility database, you will only see users who are in that site. Temporary users may be utilized for those users that are student nurses/CNAs or are contracted to only work with your facility for a short period of time.

Refer to *Enter New User* above for instructions on adding a new user into ECS. The differences between Temporary and New Users are:

- Temporary users will need dates setup in **Activation Time**. They will only be allowed access into ECS during the date range specified.
- Temporary users may only be placed into **Temporary User Groups**. If your facility does not already have **Temporary User Groups** created, this step will have to be done first. ECS defaults with a Temp User group for CNA's and Nurses.

Enter a New Portal User

Navigate via **American Data – ECS** > **Setup** > **Security** > **Portal User.** This screen will load all portal users within your facility's database in alphabetical order. Feel free to sort by any other column, by clicking onto the column heading. Keep in mind that if you only have rights to a specific facility within a multi-facility database, you will only see users who are in that site. Portal users may be utilized if your facility is using the ECS Portal, which allows family members, residents, or relatives to access the database with access only to the client record that you give them access to.

Refer to *Enter New User* above for instructions on adding a new user into ECS. The differences between Portal and New Users are:

- There will be an option to include the **Relationship** the portal user has to the client(s).
- There is no tab for Clients, Vendors, Options, or Providers. Instead there is a tab titled **Portal.** On this tab, indicate the client record(s) the user should have access to. It may be that they have access to both their mom and dad's charts, so there is a capability to add more than one client, if needed.

User Management

Remove/Inactivate a User

If a user is no longer working at the facility, their user profile should be inactivated so they may no longer access the record.

Navigate via American Data – ECS > Setup > Security > User/Temporary User/Portal User. Right click onto a user name, and select Properties. Once in here, under User Status, set their status to Inactive. This will inactive their user profile. To access any inactive users, place a checkmark in Inactive in the lower right-hand corner of the screen.

Reset a User's Password

American Data cannot reset user passwords. This includes active users, temporary users, and portal users. Password reset is the responsibility of the facility.

Navigate via American Data – ECS > Setup > Security > User/Temporary User/Portal User. Right click onto a user name, and select Properties. Once in here, click into the Password tab. If your facility has HIPAA User Security enabled in *System Settings*, you will need to know the Old Password before resetting the new. You will notice in the Password screen that Old Password is enabled. This must be filled in prior to changing a user's password.

If the Old Password box is grayed out, you do not need to know the user's prior password to reset their password. Simply click into the New Password box and Confirm New Password and type in what the new password should be. Place a checkmark in User must change password at next login so that the user may reset the password to what they would like. If their account was locked due too many invalid attempts, you will notice a checkmark in Account is locked due to too many invalid login attempts. You will want to remove the checkmark in here before clicking OK to save the updated password.

Last Name or Title Changes

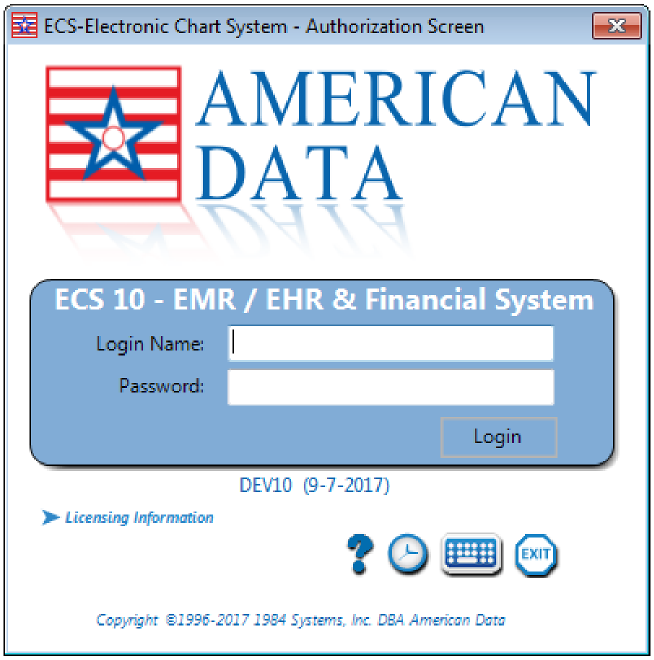
If a user has a name change or title change (e.g., from CNA to LPN, or LPN to RN), you will want to Inactivate their current user and create a brand-new user. This is because if you were to just change the last name or their job title, it will reflect all past documentation as well as all future charting. Obviously, we need it to be reflected in future charting, but because this is a legally binding signature in the record, a new user profile needs to be created to reflect changes going forward. Once the current user is inactivated, all past documentation will remain with that username and job title. Follow instructions above for *Remove/Inactivate a User* and *Enter a New User*.

Core Training

Logging into ECS

1. Double-click the ECS icon to bring up the *ECS Authorization Screen*.
2. Enter your login name and password.
3. Enter a Delay Login for this session, if desired. (See below for details.)
4. Click **Login**.
5. Alternate Login: If the computer you are using has a fingerprint reader on it, you may scan your fingerprint rather than entering your login name and password.
6. Once logged into the system, verify your name in the bottom toolbar in ECS as this is going to serve as your legal signature on all your documentation.

Authorization Screen



- This is the screen that appears after you double -click the ECS icon.
- The  icon brings up a keyboard (if needed).
- Click the **Licensing Information** link to find your Build or version number, as well as contact information for American Data's customer support.

Password

- Each user will be assigned a password that will need to be changed upon initial login.
- Users must select a password that is a minimum of 6 characters long and contain at least one number or letter based on system settings.

- Users may be required to change their password at regular intervals.
- A fingerprint reader may be used in place of a password.
- Your login and password should never be shared to ensure your electronic signature remains secure.

Changing your Password

- You may be prompted to change your password upon logging into ECS. This may occur if you were given a generic password when your profile was created. Or, your ECS may be set to require a password change at regular intervals.
- When you log into ECS on the *Authorization Screen*, the *Change Password* screen will appear. You will be required to complete 3 fields: Old Password, New Password, and Confirm New Password. Enter your current password (the one you just used to log in) into the Old Password field. Decide on a new password (at least 6 characters long) and enter it into the New Password field. Enter the new password one more time into the Confirm New Password field. Then, click OK to confirm changes.
- Your login name does not change when you change your password.

Delay Login

- This field appears on the *Authorization Screen*.
- This is useful if you are using an ECS application that is set to automatically lock you out after a brief time, by allowing you to use the shorter password to log back in.
- You may enter an abbreviated password (*i.e.,* if your password is 123456789, you may enter a 1- or 2-digit password, such as 19).
- Delayed logins are valid for the current ECS session only. The delay login *must* be reset each time you log into ECS.

Fingerprint Authorization

- This is optional in most states but mandatory in Ohio for completing electronic Medication Pass.
- If your duties require use of fingerprint authorization in ECS, you will be required to scan your fingerprint when your user profile is set up.
- When prompted to enter fingerprint authorization, place your fingertip on the scanner.
- Your fingerprint may be used to log into ECS in place of a login/password.

Electronic Signatures

- Each entry you create in ECS is tagged with "identifiers." These include the date of the entry, the time of the entry, and the name, title, and initials of the user logged into the session.
- Electronic Signatures are legally binding and serve the same purpose as a manual signature at the end of a note or assessment. For this reason, *always* make sure you log off at the end of your session, and that you log yourself in at the beginning of each

session. This helps ensure that no one else can chart with your signature, or that you chart with someone else's signature.

Hide/Secure ECS Feature

1. The Hide ECS feature gives you the chance to lock ECS on the computer you are working on for a short time if you need to step away from the screen (*i.e.,* medication pass). This acts like a "bookmark," keeping your place while preventing others from seeing the screen or logging you off.
2. Click the Hide icon or go to American Data – ECS > Hide ECS.
3. 'Hide ECS' may be set to kick in automatically during certain ECS applications (*i.e.,* after 30 seconds of idle time).
4. When 'Hide ECS' takes effect, ECS is minimized and a screen pops up displaying the name of the user currently logged into that session. Only that user's password or Delay Login will bring ECS back up.
5. If the user who activated the Hide ECS feature is unavailable to log back in, the session must be ended by other means, such as Ctrl+Alt+Delete. The procedure may vary depending upon other variables, such as whether ECS is operating on thin clients or in a Citrix environment. This is typically worked out with the facility's IT department.

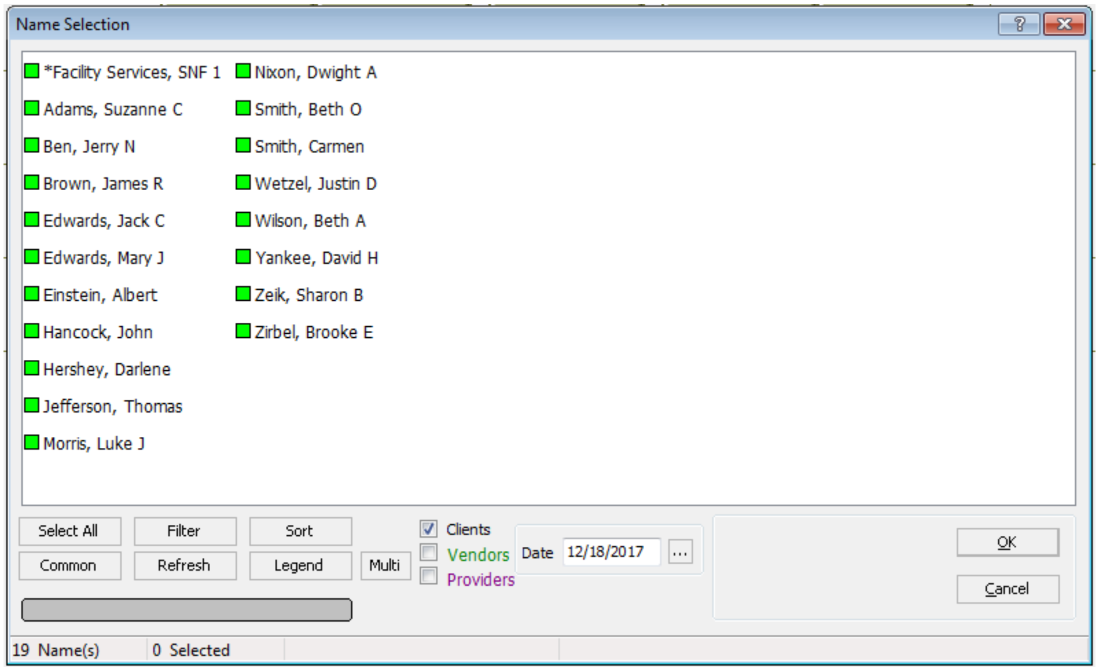
Exiting ECS

1. It is important to log out of ECS whenever you will not be actively using it, to ensure that no other user can access it with your user profile entered.
2. To close out of ECS, first close out of all the screens that are open. This includes any documentation, viewing, MDS or other screens that may be open or layered on top of one another. Each screen that is open is represented by a tab at the top of the screen. Click the X on the tab to close each tab.
3. Click the in the top right corner of ECS to logout or go to American Data – ECS > Exit.

Selecting Clients

- Most tasks/procedures in the clinical record are client- (or provider-) driven. Whether you are charting, reviewing charts, or reviewing reports, you will typically need to define for which client(s) you are doing so.
- Most processes in ECS require you to select clients from a *Name Selection* screen to complete the process.
  - The client list typically defaults to a list of current active clients (except the business office, which includes all clients with active AR accounts, and Human Resources, which accesses provider records rather than client records).
  - When your user profile is set up, it may be set to show all active clients, or may be narrowed down to display a specific unit.

- Corporate clinical staff typically has access to clients from all facilities.

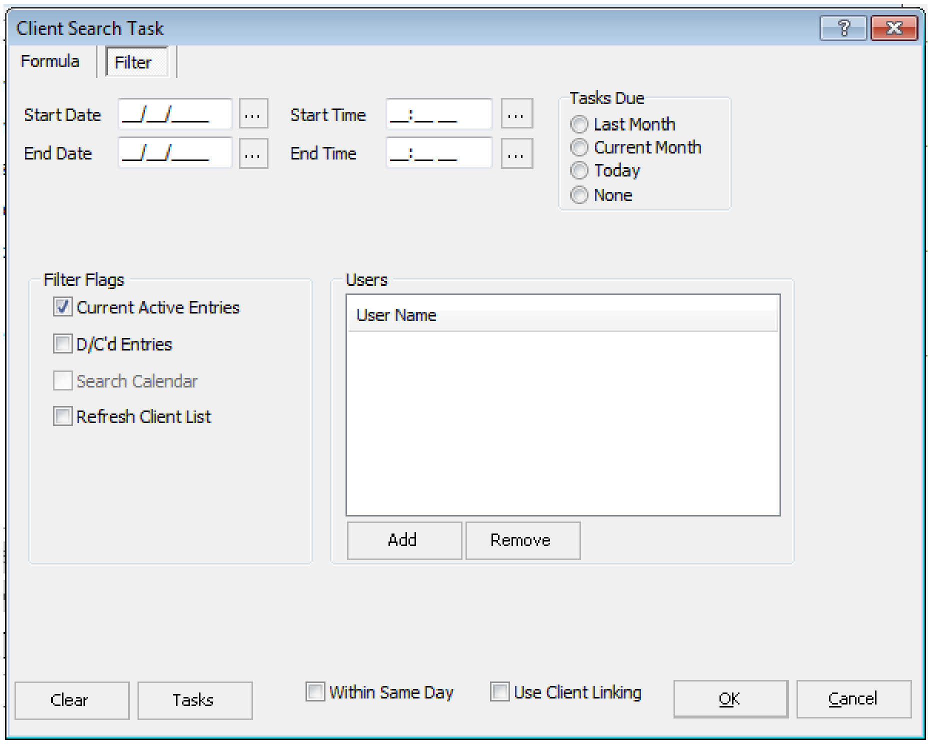


Filtering the Client List

- The client list has a **Filter** button at the bottom which allows you to expand or narrow down the list based on specific filters set on the *Demographic* screen.
- For purposes of managing the client list, each client is assigned to one of 6 statuses: Active / Inactive / Hold / Referral / Other / Closed Account. After clicking **Filter**, you may add or remove checkmarks from the six (6) statuses to bring up the list of desired clients.
- Clients may be also be categorized into six (6) filters. The first two (2) are Site and Service, which are defined by the location of the client on the campus. Four (4) additional filters are available to be used as needed by the facility. Typical settings for these filters include: Unit, Med Cart, Floor, CNA Assignment, but may be any filter needed by the facility. After clicking **Filter**, you may select from the filters as needed to narrow down your client list to those clients who share a specific filter (*i.e.,* Unit 1). Hold the **Ctrl** button on your keyboard to select more than one filter option at a time from a category (*i.e.,* Unit 1 and Unit 2).

Using "Common" to Define the Client List

1. The *Name Selection* screen has a **Common** button at the bottom which allows you to narrow down the client list based on entries in clients' records (*i.e.,* clients in-house on a certain day, clients with the same doctor, clients with the same religion, etc.).



2. Click the **Common** button.
3. Click the **Tasks** button.
4. Select the task(s) you need and click **Load**.
5. Select dates (if needed) and click **OK**.
6. The client list will be narrowed down to clients that meet the criteria of the common task.

Selecting Clients

1. Click the name of the client you want.
2. To select several clients, hold the **Ctrl** button on your keyboard, or click the **Multi** button. Each name you click will remain highlighted.
3. To select a whole section of clients, click the first name, hold the **Shift** button on the keyboard, and then click the last name. All names between the two will be highlighted.
4. To select all the displayed names, click the **Select All** button at the bottom of the screen.

Switching/Changing Clients

1. For documentation, use the next/previous client arrows to switch to the next or previous client selected. When only one client is selected, click **Name** to select new or additional names.
2. Any screen displaying a Name(s) button allows you to select different names other than the currently selected one(s).

Documentation Basics

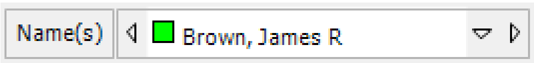
ECS is based on the idea that when staff enters information into a client's record, each piece of information is stored into a Section of the chart (*i.e.,* Face Sheet, Nurses Notes, Physician Orders) and a specific Topic within that Section (*i.e.,* Social History, Personal Information, Lab Results). All the stored entries are available to other users and can be pulled together from all different areas for review. This design eliminates much of the duplication seen in form-based charting.

Bringing Up a Write Screen

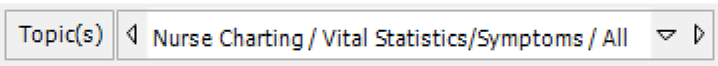
1. Click the appropriate charting button on your easy access screen. For example, to document Behavior in Nurse Charting, click the **Behavior** button on the *Nursing* Access screen.
2. The other methods are to click the **Write** icon or go to **American Data – ECS** > **Write** > **Entry**.

Elements of a Documentation Screen

1. A client(s) is selected that the entries are saved to.



2. A Section and Topic are selected or defined, in which the entries are saved.



3. A library of terms is displayed with a text box below the documenting screen.
4. The documenting screen contains questions and responses pertinent to the topic selected.
5. Notes and assessments are created by selecting words and phrases from the documenting screen and adding text as needed to build the note.

Typing vs. Clicking

- Overall documentation should consist of about 50-75% clicking (words/phrases from the library of terms), and 25-50% typing.
- Clicking key phrases allows the documentation to pull over to MDS, Billing, and Reports.
- Adding your own text/wording to elaborate on the documentation ensures the charting is specific and detailed.

Late Entries

Most documentation screens have a word "Late Entry" that can be clicked when an entry needs to be made for a previous shift or prior date. This word may be selected at the beginning or end of an entry. It prompts you to select a date which the entry is for.

Defined Review

Most documentation screens display a View screen at the bottom of the screen with data that is relevant to the charting being completed (*i.e.,* Pain Assessment displays the client's

Analgesic orders and recent PRN pain medication use). This View screen has all the capabilities of using the **View** icon or the **View Chart** button.

Viewing Records

A View screen allows you to view one record or multiple records at a time. It is a powerful tool for reviewing charts, identifying clients and risk, and finding clients with common data elements (*i.e.,* wounds, falls, psychotropic meds, lack of stool output, etc.)

1. There are several ways to pull up a View screen. From an Access screen, click the **View Chart** button. Or, click the **View** icon or go to **American Data – ECS > View > Entry.**
2. Select the client(s) you wish to review data for (use Filter, Common, and Select All as needed), and click **OK**.
3. Select the **Topic** button to select the Section, Topic(s), or Word(s) you wish to review in the record(s). Or, click the **Task** button to select the task(s) you wish to view, and then click **Load** and **OK**.
4. Click **Control**. Use the **Filter** tab to select parameters for the search (if needed), including date range, time range, and/or discontinued entries.
5. Use the **Look** tab to display entries a certain way, including sorting by topic or in chronological order, lines between topics, free text highlighter, show names of initials, etc.
6. Click **Go** to display the entries.
7. Click any of the **Client**, **Topic**, **Task** or **Control** buttons to change the selections made. **NOTE:** You will need to click **Go** after changing any selections to display the new results.

Reports

General Reports

Many of the different access screens have easy buttons linked to commonly used reports. For example, the *Activities* Access screen has a column of reports including a Birthday list and Attendance logs, and the *ADT/Face Sheet* Access screen has a column of reports including the Daily Census and the Room/Bed list. To view one of these reports, click the appropriate easy button, select the desired client(s) from the name selection list, and click **OK**. To view a report that may not be linked to an easy button, follow the steps below:

1. Click the Reports icon. Or, go to American Data – ECS > View > Report > General.
2. Select the desired client(s) and click **OK**. The *Report Selection* screen appears.
3. Select the report(s) and click **OK**. Or, click the **Tasks** button, select the task(s), and then click **Load**.
4. Select dates, times, and users as needed.
5. Select the **Preview** checkbox to see a preview of the report before it is printed.
6. Click **OK** to display the preview.
7. When previewing the report, if you wish to change any printing parameter, such as which clients or dates you selected, click the **Control** button to return to the *Report*

Selection screen and then make your change. When you click **OK**, the report preview will refresh.

8. Select the printer icon to print, the PDF icon to save to pdf, or click **Close** when finished.

Calendar Reports

Several of the frequently used calendar reports are linked to easy access buttons. For example, the *ADT/Face Sheet* Access screen has a column of calendar reports including a Statistics calendar and a Diagnoses calendar. To view a Calendar Report, click the corresponding easy button, select the desired client(s) from the name selection list, and click **OK**.

To view a calendar that may not be linked to an easy button, follow these steps:

1. Click the Calendar icon. Or, go to American Data – ECS > View > Calendar.
2. Select the desired client(s) and click **OK**. The *Calendar Report* screen appears.
3. Click the **Tasks** button, select the desired task(s), then click **Load**.
4. Select a date range.
5. Click **OK** to preview the Calendar Report.
6. Click the **Control** button to return to the calendar task setup if you want to alter clients, task, dates, or other options.
7. Click the **Print** button to print the report.

Editing

Only entries displayed on a View screen can be edited. All changes to entries are tracked by date, time, and user. Entries are never completely removed from the record. Editing rights vary by user group and responsibility.

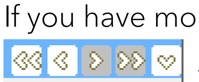
1. On a View screen, click the entry you want to edit. This is called "tagging" the entry and will turn the text red. If you select multiple entries, the first entry you selected will appear with a yellow highlight.
2. Click the **Edit** button, or right-click the entry to display the editing menu.
3. See the chart below for all editing options.
4. Complete the Editing action as needed (all the append, new and copy-editing options involve adding or confirming documentation).
5. Click **Go** to refresh the screen and display (or remove) changes.

Editing Feature	Function	Example
Append / Append All	Information is permanently attached to the entry; further editing will not be able to be done to the entry except to discontinue	Cosigning a student's documentation

New	A new, separate entry made in the same topic area	Not typically used when editing department notes. Can be used to see where an entry was charted
Copy	An exact copy of the entry is made	An entry was accidentally discontinued and needs to be made active again
Copy One (All) to Other Client[s]	An exact copy of the entry is made and placed in another resident's chart	An entry was accidentally made in the wrong resident's chart. Use ALL if more than one entry was selected
Discontinue and Append	Entry is discontinued and user is taken to a Write screen to document additional notes	An error was made in documenting the entry and the user would like to explain why the entry is being discontinued
Discontinue and New	Entry is discontinued, a new entry is made in its place	Not typically used when editing department notes
Discontinue and Copy	Entry is discontinued, copy of entry is displayed allowing user to make changes to the original entry	User forgot to use a button word when documenting and would like to 'insert' the word into the entry
Discontinue	Entry is discontinued	Not typically used when editing department notes
Discontinue All	All highlighted entries are discontinued for one client	Not typically used when editing department notes
Discontinue Multiple Client Entries	All highlighted entries are discontinued for multiple clients	Not typically used when editing department notes
Skip	Allows user to skip a highlighted entry	Highlighted an entry that does not need editing

Other Features

Layering Screens

1. Each screen is represented by a tab at the top of the screen.
2. If you have more tabs open than can fit on the screen, you can use the arrow buttons  to bring tabs into view. Click **>** to scroll to the right. Click **>>** to move the screen to the furthest tab on the right. Click **<** to scroll to the left. Click **<<** to move the screen to the furthest tab on the left (**Toolbar** tab).
3. Click **American Data – ECS > Window**. From here, you can "tile" (side-by-side) or "cascade" (top-to-bottom).
4. Each open screen must be exited prior to exiting your ECS session.

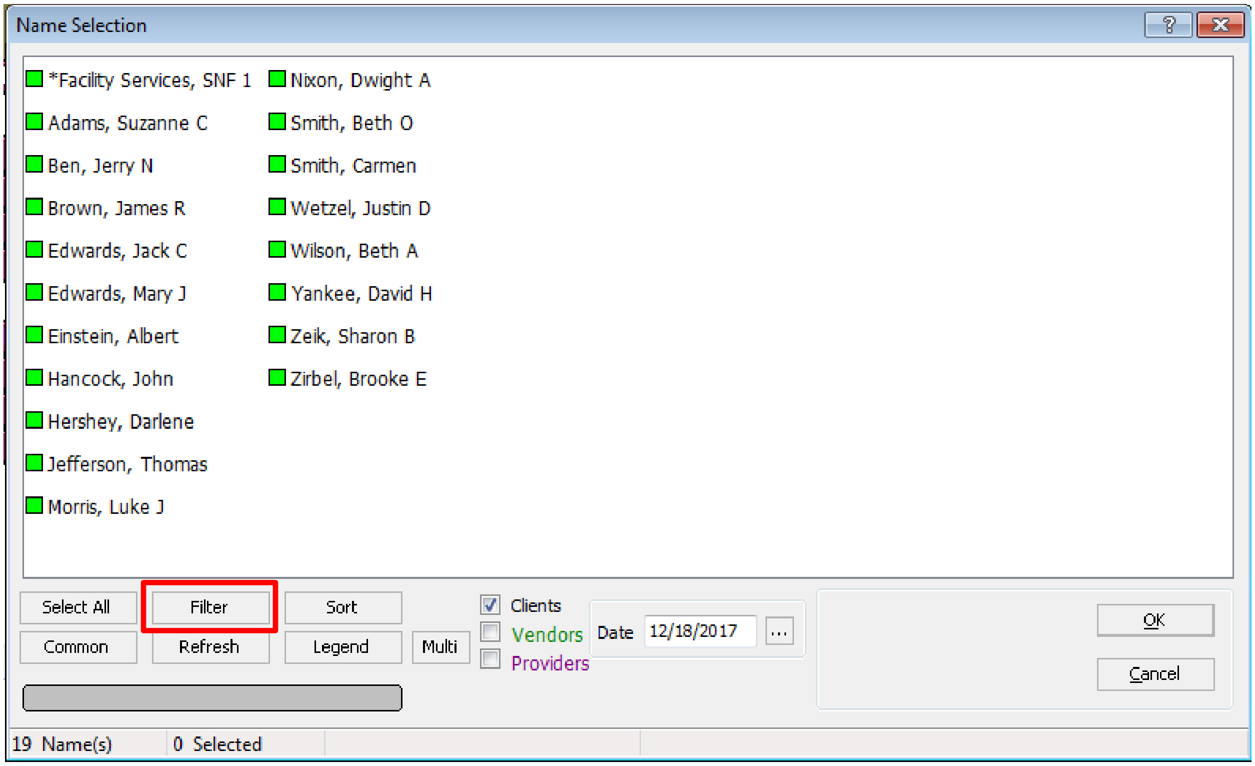
Internal Communication

An internal email system for ECS users.

- Messages can be set up to happen automatically (*i.e.,* when it is charted that a client falls), or created manually by clicking words or topics to send messages to others.
- You can access your messages by clicking the envelope icon on the bottom toolbar. This icon will be covered by a number in a red circle to indicate how many new messages the user has. If the user receives more than 9 new messages, the icon will be covered by an exclamation point in a red circle. If the user has 10 or more unread messages, the envelope will be covered by an exclamation point in a yellow circle. Users can also hover over the envelope to view the number of unread messages.
- Unread messages are indicated by bold font.
- To delete a message, highlight it and select **Delete**.
  NOTE: Deleting messages does *not* remove the chart entries within the record.
- Store messages in yellow file folders by right clicking into the blank space to the left of the messages and selecting **New Folder**. The folders can be moved up and down in the list by using the double up and double down arrows on the bottom of the screen.
- Use the *Memo client to create messages not specific to a resident. Select the Memo Section and Topic to write these messages.
- Some messages may indicate that a co-signature is required. **Edit** and **Append** the entry if you are required to cosign.

Using Fake Residents for Practice

1) Log into ECS using your login username and password.
2) Click **Filter** on the *Name Selection* screen.



3) Remove the checkmark from **Active** and place a checkmark in **Other**.
4) Click **OK**.
5) Select any resident(s) from this list and click **OK**.

Training Handout for Surveyors

Login to ECS

Double click the ECS icon. Enter your login name and password on the Authorization screen and click Login.

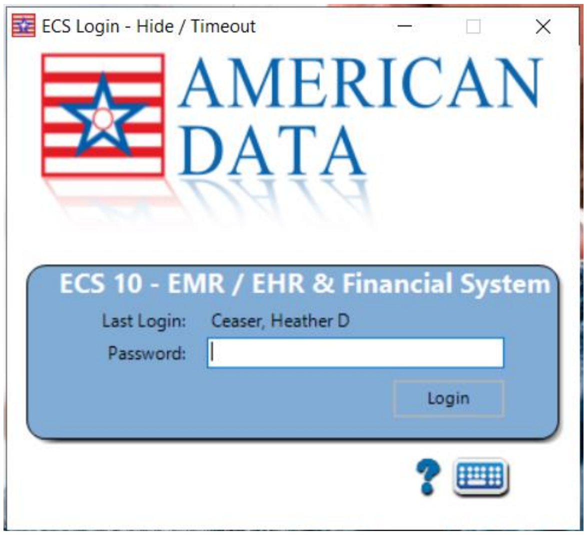
Your login name is: ___________________

Your password is: _____________________

Surveyor							
Hide ECS	Pressure Ulcers	Falls	Elopement	PASARR	MDS	All Nurses Notes	Physician Charting
	Dialysis	ADL Status	Change of Condition	Advanced Directives	CAAs	CNA Documentation	MARs
	Infections	Bowel and Bladder	Physician Orders	Hospice	Care Plans	Restorative Charting	TARs
	Nutrition	Hospitalization	Diagnoses	Social Services Charting	Face Sheet	Activity Charting	View Chart

Secure ECS During Idle Time

1. From the Access screen, click the Hide ECS button.
2. The Hide/Timeout screen appears. Only the same user can log back in.
3. To log back in, enter your password and click Login.

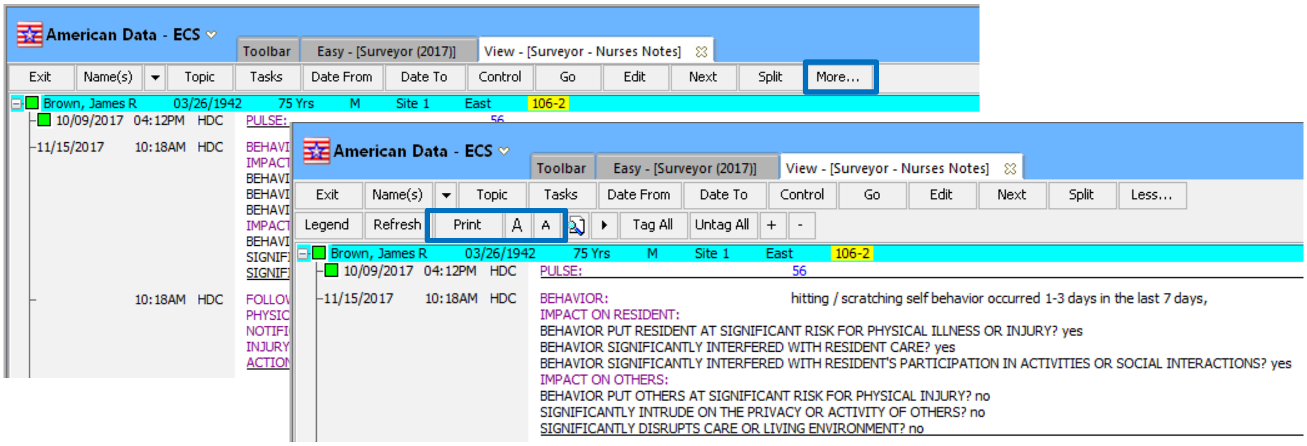


View Chart Entries

From the above access screen, click the button related to the information you wish to review. Select resident name(s). Click OK to load the task. Once the View screen begins to load, you may see one of two options:

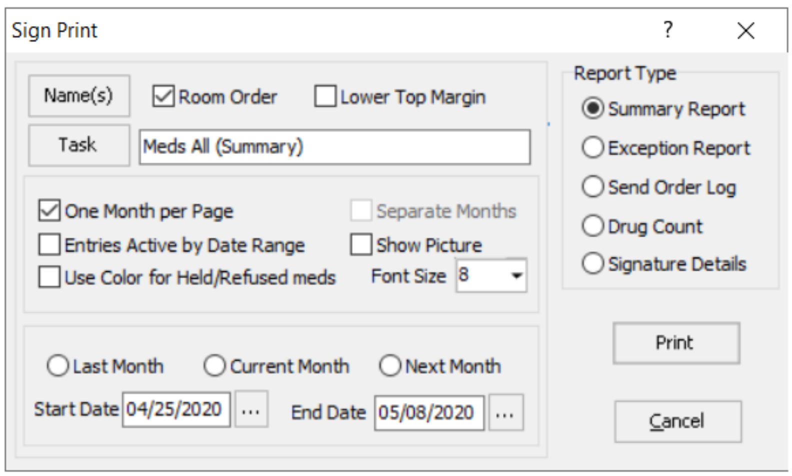
1. You are presented with a date popup prompting you to select a date range. If so, select the Start Date and End Date and click OK. Once in the View screen, click Go to tell the system to search for the data. Or,
2. The View screen may load automatically as it does not require dates or already has a selected period attached to it (typically 460 days' worth).

To adjust the font size within the View screen or to print the data, click onto the **More…** button. This will then give a **Print** button as well as a big and little "A" which can be used to adjust font sizing.



View MARs and TARs

1. From the access screen, click onto **MARs** or **TARs**.
2. Select resident name(s) and click **OK**. A **Sign Print** window will appear.
3. Select the date range you would like view, adjust font size (if needed).
4. Once everything has been selected, click **Print**. This will present you with a preview of the MAR/TAR prior to determining whether you would like to print or save the document.



View MDS

1. From the access screen, click onto the **MDS** button.
2. Select resident name(s) and click **OK**.
3. A list of the resident's MDS' will appear in the MDS Selection Screen.
4. Select the MDS you wish to review and click **OK**.
5. The MDS will preview.

View CAA's

1. From the access screen, click onto the **CAAs** button.
2. Select resident name(s) and click **OK**.
3. A list of the resident's MDS' will appear in the MDS Selection Screen.
4. Select the MDS you wish to review CAAs for and click **OK**.
5. The CAAs report will appear in a print preview screen.

Client Sign On Guide

Dashboard

Upon log in, you will be taken to the Dashboard. On the Dashboard you can find recent announcements, a link to the forum, and the latest materials posted in each resource section. Clicking "Dashboard" from anywhere in the site will take you back to the Dashboard screen. In the Navigation Bar, you will see options in the menu for each resource area of the site.

Updates

The **Updates** page provides links to download the latest ECS Software Updates as well as access past updates.

Videos

Under the **Videos** tab, you will find links to the Training Videos page, the Upcoming Webinars page, and the Past Webinars page. American Data offers a wide variety of training videos, categorized for your convenience.

Documents

Under the **Documents** tab, you will find links to the Support Documents page and the Newsletters page. All documentation from the ECS User Manual is available in the support documents page. Simply search by keyword to bring up all documents containing the desired terms or browse the list of articles. From the Newsletters page, you may access current and past newsletters, as well as the form to subscribe to our email lists.

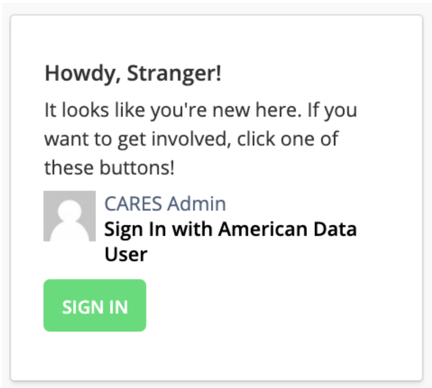
User

Under the **User** tab, you will find links to the Your Profile page, the ECS User Forum page, the Contact Us page, as well as the logout button. If you are logged into your Facility's account, you will also see links to the Staff Directory page and the Add Staff page.

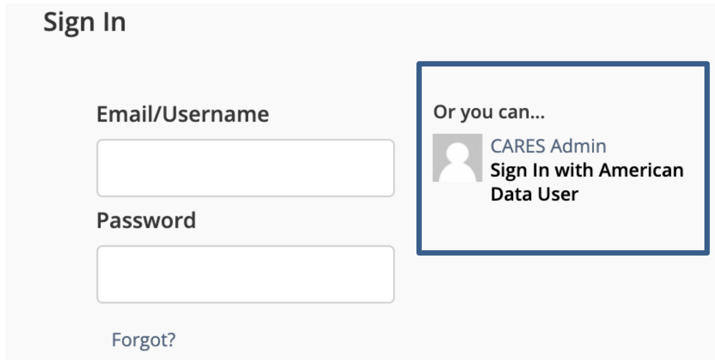
ECS User Forum

Interact with other ECS Users and American Data Staff to discuss recent updates, new features, important announcements and all things ECS. To comment or start a discussion, locate the Sign In button in the right- hand panel (A). Then click "Sign In with American Data User" (B).

A.



B.



Updating Your Profile

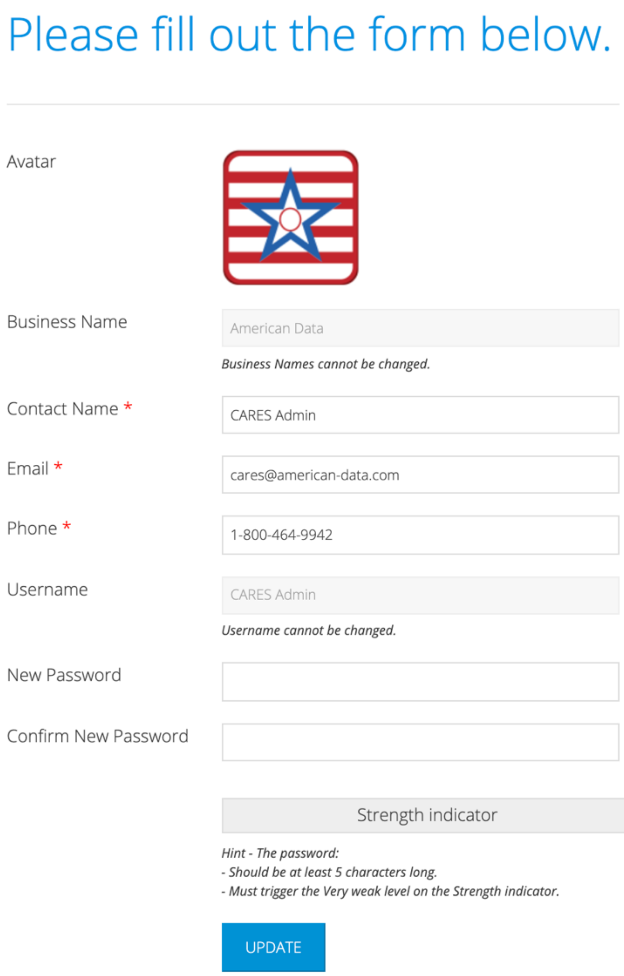
The "Your Profile" page is where you can find and update the primary contact information for your facility. It is important to update this form in the instance of a new administrator, a change of email address or a change of phone number.

Please note: The Business Name and Username field cannot be changed.

If needed, you may change your password in the "New Password" field.

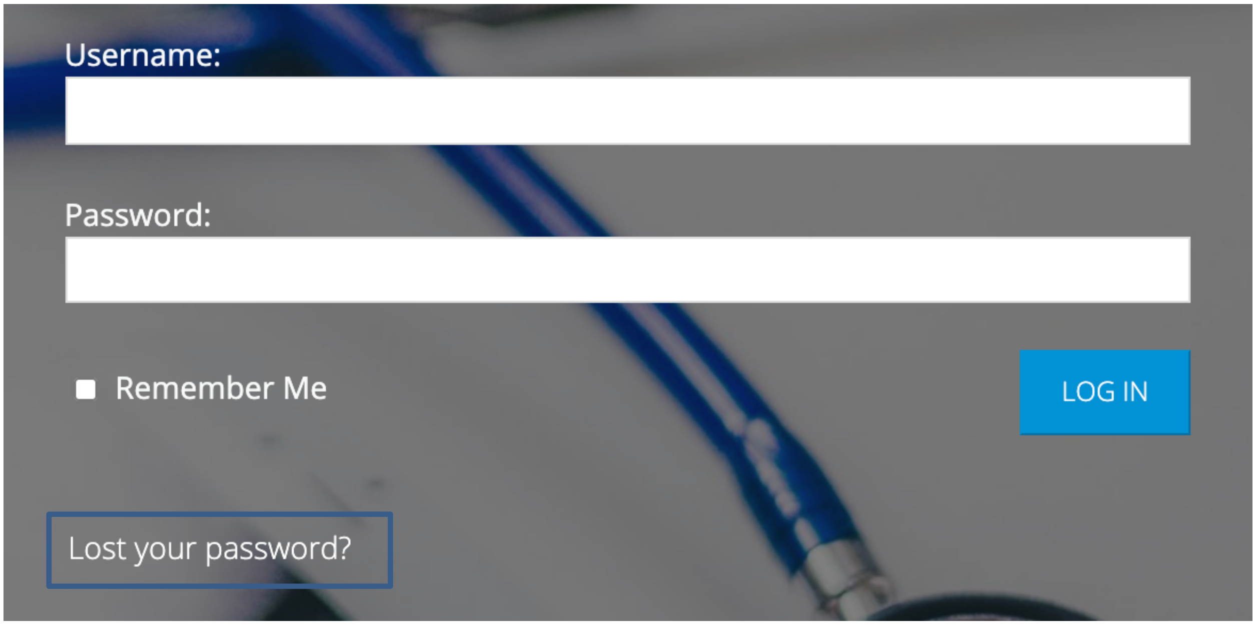
Do not forget to save the updated information by clicking the "Update" button at the bottom of the page.

The page will reload, and you will be informed your changes were successfully made at the top of the form.



Forgot Username/Password

If you happen to forget your username or password to log into the Client Sign On, you may use the "Lost your Password?" link on the log in screen. This will prompt you to enter the email address tied to your account and will send an email with instructions on how to reset your password. The email will display your username.



Facility Administrator Log In

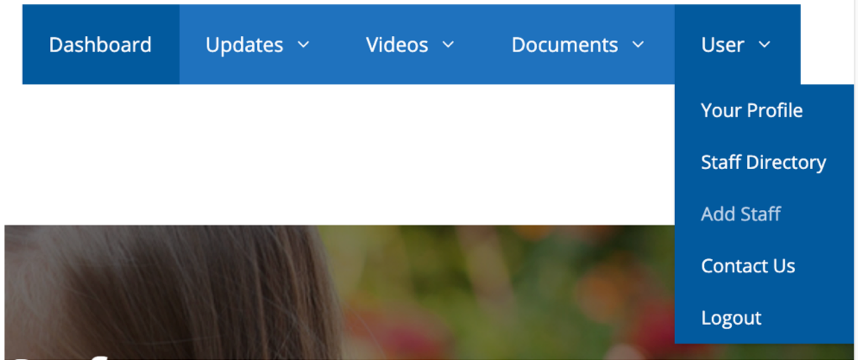
As a Facility Administrator, you log into the Facility Account using the username provided by American Data. You will have the responsibility to register and create the profile for each member of your staff, so they have the ability to log into their own Staff Account. After initial registration, you will have the ability to add, edit, and delete staff members from your staff directory. Your staff members will have the ability to edit their own contact information after initial registration. It's important to keep this information up to date so we know the right contacts are receiving important ECS announcements.

If the Administrator or ECS System Supervisor at your facility changes, American Data will need to update the contact information of the person tied to the Facility Account. It's important to do this prior to the contact person's last day so American Data receives permission from the account holder to update the account. To do this, please email cares@american-data.com with the current account holder's approval and the new contact's information, or call 1-800-464-9942.

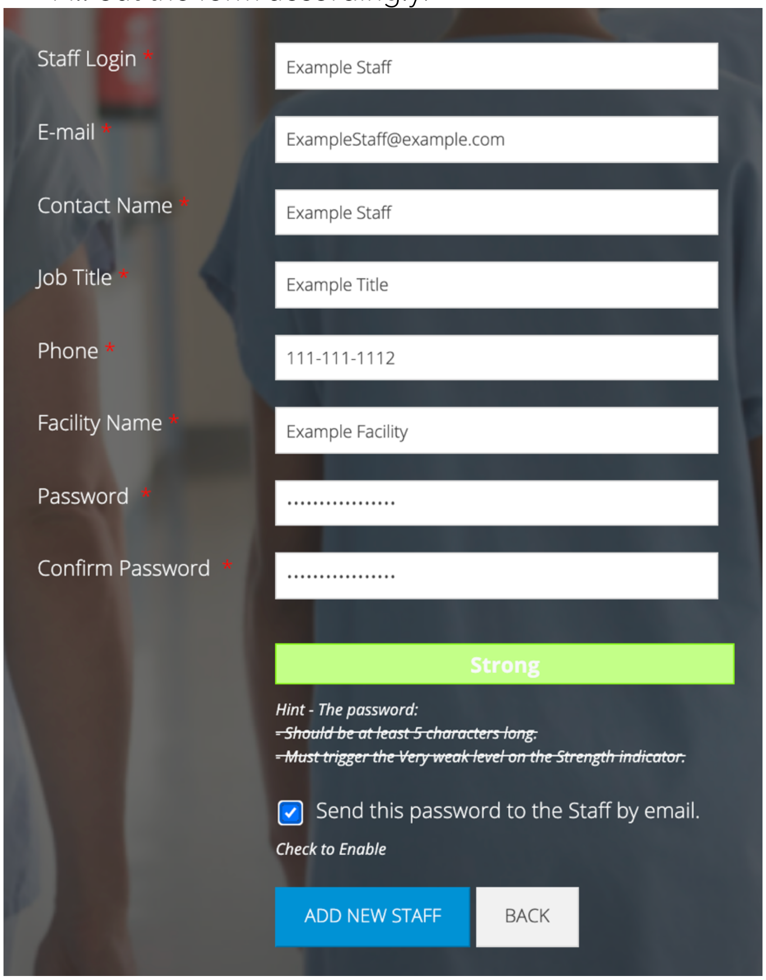
Adding Staff

It is important to add new staff members to keep your staff directory up to date.

Under the "User" section of the menu, click "Add Staff" in the drop down to fill out the form.



Fill out the form accordingly.



Staff Login: Enter in the desired username for the staff member. We recommend using the staff member's first and last name.

Password: Enter in a temporary password for the staff member to use. This can be changed by the staff member after log in.

Fill out the other required fields with the contact's information.

Be sure to **check the box** "Send this password to the Staff by email" so they will be notified their profile was created.

Once the form fields are correctly filled out, click the "**Add New Staff**" button to save the information.

You will then be redirected to the "Staff Directory" page where you can see your staff member was successfully added.

Editing Staff

In the instance a staff member is no longer with your facility, you may remove the staff member's contact information by clicking "Delete" under their name. If a staff member's contact information changes such as an email address, phone number, or job title, these fields can be updated by clicking "Edit" under the staff member's name.

Dashboard | Add Staff

Staff	Email Address	Contact Name	Job Title	Phone	Facility Name
CARES Staff Edit | Delete	info@american-data.com	CARES Staff	CARES Staff		American Data
New Staff Member Edit | Delete	NewStaff@gmail.com	New Staff	DON	000-000-0003	American Data

You will then be redirected to the "Edit Staff" page where you can update the information in each field. **Please note:** "Staff Login" and "Facility Name" cannot be changed.

If needed, you may change the password in the "Password" field. If a password is changed, be sure to check the box "Send this password to the Staff by email" so the staff member will be notified via email.

Once you have made all the necessary changes, click the "Save Staff" button to save the information. You will then be redirected to the Staff Directory page where you can see your changes were successfully saved.